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PROCEDURES FOR CONDUCTING THE REPORTS MANAGEMENT SURVEY

1. GENERAL

- a. The reports survey is an essential step in establishing the Office of Personnel Reports Management Program. It provides a basis for: (1) A complete description and case history of each reporting requirement, and (2) an analysis of these requirements to point up reporting deficiencies and ways to correct them. In addition, the survey will provide experience on which to base policies and procedures for continuing this program. The importance of this survey thus dictates that persons selected to participate should have a broad knowledge of their component's reporting requirements, and be qualified to analyze them objectively for possible improvements.

2. DEFINITIONS

- a. Report - An account or statement of information in written narrative, tabular, punch card, or graphic form, transmitted from one organizational element to another in response to an expressed or assumed need for information.
- b. Administrative or Management Report - A report that provides for administrative or management control over an activity or operation, as distinguished from an operational or intelligence report.
- c. Recurring Report - Either a periodic report which conveys essentially the same type of information at prescribed intervals (daily, weekly, monthly, etc.) or a situation report which is prepared on each occurrence of an event of certain prescribed characteristics.
- d. Required Report (Incoming Report) - A report which a component requires from one or more other elements. The report is an incoming report to the office which requires it.
- e. Prepared Report (Outgoing Report) - A report which a component prepares at the request of another element. The report is an outgoing report from the office which prepares it.

Attachment B

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REPORTS MANAGEMENT SURVEY -
Continued

3. THE INVENTORY

- a. The following action shall be taken on each current requirement for either a required or prepared report:
 - (1) Complete an original and one copy of Form No. 521, Report Survey (Attachment A).
 - (2) To the original of each Report Survey, attach a copy of each directive having a bearing on the report, a specimen copy of the report, and any other descriptive material.
- b. It will not be necessary to furnish copies of directives (authorities) issued as Agency or Office of Personnel regulatory material.

4. THE APPRAISAL

- a. Personnel shall appraise each reporting requirement simultaneously with taking the inventory. The need for required reports will be fully justified. Prepared reports shall be examined with a view to improving preparation procedures, and recommending to requiring offices, way to reduce or simplify reporting.
- b. Form No. 521 contains questions which establish criteria for appraising reports. Additional guidance may be found in Attachment B, "Analyzing Requirements for Administrative or Management Reports," copies of which may be obtained from the RCO/OP.

5. SUBMISSION OF INVENTORY AND APPRAISAL MATERIAL

Completed Report Survey forms, together with supporting material and recommendations, shall be forwarded through supervisors and component chiefs for review, prior to being submitted to the ExO/OP, through the RCO/OP, on or before 28 October 1955.

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REPORT SURVEY		1. DATE OF SURVEY	2. TYPE OF REPORT	
3. PERSON TO CONTACT REGARDING REPORT	NAME	COMPONENT	REQUIRED	PREPARED
			ROOM NO. AND BLDG.	PHONE
4. REPORT TITLE				
5. AUTHORITIES OR DIRECTIVES REQUIRING THIS REPORT				
6. REPORTING FREQUENCY (<i>Daily, weekly, monthly, as situations occur, etc.</i>)		7. REPORT FORMAT (<i>Form no., memorandum, machine tabulation, etc.</i>)		
8. DATE REPORT IS DUE		9. NUMBER OF REPORTS RECEIVED/PREPARED ANNUALLY IF REPORT IS A "SITUATION" REPORT		
10. OFFICES OR ACTIVITIES REQUIRED TO SUBMIT THIS REPORT		11. DISTRIBUTION OF THIS REPORT ORIGINAL: COPIES:		
12. ESTIMATE OF THE NUMBER OF MAN HOURS REQUIRED TO PREPARE THIS REPORT ONE TIME. INCLUDE MAN HOURS REQUIRED AT ALL LEVELS TO MAINTAIN RECORDS, COLLECT DATA, PREPARE FEEDER REPORTS, AND COMPILE THE FINAL REPORT.				
13. COMPLETE THE FOLLOWING AS APPROPRIATE TO EITHER A "REQUIRED" OR "PREPARED" REPORT, OR BOTH, USING SPACE 14 IF NECESSARY.				YES NO
A. DOES THIS REPORT DUPLICATE IN WHOLE OR IN PART ANY OTHER REPORT? IF SO PLEASE EXPLAIN.				
B. IS THE INFORMATION REPORTED IN MORE DETAIL, SUBMITTED MORE FREQUENTLY, OR GIVEN WIDER DISTRIBUTION THAN IS CONSIDERED NECESSARY TO SERVE THE PURPOSES FOR WHICH THE REPORT WAS ESTABLISHED?				
C. IS THIS REPORT THE RESULT OF AN ADMINISTRATIVE OR PROCEDURAL PROBLEM WHICH SHOULD BE CORRECTED RATHER THAN REPORTED ON?				
D. COULD THE PURPOSES OF THIS REPORT BE SERVED BY DIRECT SUPERVISION OR INSPECTION, OR BY BRIEFINGS, STAFF MEETINGS, ETC.?				
E. HAS OFFICE ROUTINE EVER BEEN DISRUPTED OR HAS OVERTIME EVER BEEN REQUIRED TO MEET THE SUBMISSION DATE FOR THIS REPORT?				
F. DO YOU RECOMMEND THAT THE FORM OR FORMAT OF THIS REPORT BE REVISED WITH RESPECT TO: (1) SPACING? (2) WEIGHT OF PAPER? (3) POSSIBLE ELIMINATION OF TRANSMITTAL CORRESPONDENCE?				
G. IF THE REPORT IS REPRODUCED BY MIMEOGRAPH, DITTO, MULTILITH, ETC., DO YOU RECOMMEND THE PROCUREMENT OF REPRODUCIBLE MASTERS WITH HEADINGS, LINES, ETC. PREPRINTED THEREON TO EXPEDITE PREPARATION OF THE REPORT?				
H. WOULD YOUR OFFICE DISCONTINUE: (1) MAINTAINING (2) COMPILING THE DATA BEING SUBMITTED IN THIS REPORT IF THE REQUIREMENT FOR ITS SUBMISSION WERE RESCINDED?				

14. REMARKS (If you require this report, briefly state its purpose, and list the data sources. State any contemplated action for obtaining the report. Consider changes in conditions since the report was established. If you prepare this report, furnish a general opinion of its value. Cite any evidence or lack of evidence that the report is worth its cost. Recommend any improvements, including methods for preparing and submitting the report.)

☐ CONTINUED ON SEPARATE SHEET

REVIEW BY CHIEF OF COMPONENT

RECOMMENDATIONS

☐ CONTINUED ON SEPARATE SHEET

DATE

TITLE

SIGNATURE

REQUEST FOR APPROVAL OF NEW OR REVISED REPORTING REQUIREMENT				DATE OF REQUEST	
TO:					
THROUGH:					
1. PERSON TO CONTACT REGARDING REPORT		NAME	ROOM NO.	BUILDING	PHONE
2. TITLE OF REPORT AND REPORTS CONTROL SYMBOL IF ONE HAS BEEN ASSIGNED					
3. TYPE OF REPORTING REQUIREMENT		4. IF REVISED, STATE NATURE OF REVISION			
NEW					
REVISED					
5. LIST ANY REPORTS TO BE SUPERSEDED BY THIS NEW OR REVISED REPORTING REQUIREMENT				6. PROPOSED DURATION OF REPORT	
				INDEFINITE	
				TEMPORARY (<i>Indicate period</i>)	
7. CITE DIRECTIVES, AUTHORITIES OR INSTRUCTIONS ORIGINATED BY YOUR IMMEDIATE ORGANIZATIONAL ELEMENT WHICH REQUIRE THIS REPORT					
8. CITE OTHER CURRENT DIRECTIVES, AUTHORITIES OR INSTRUCTIONS AFFECTING THE REPORT					
9. REPORT FORMAT (<i>Form no., memo, machine tabulation, etc.</i>)		10. REPORTING FREQUENCY (<i>Daily, weekly, monthly, as situations occur, etc.</i>)		11. DATE REPORT IS DUE IN YOUR OFFICE	
12. DESCRIBE SUPPORTING MATERIAL TO BE SUBMITTED WITH REPORT					
13. ACTIVITIES OR COMPONENTS REQUIRED TO SUBMIT THIS REPORT			14. DISTRIBUTION OF REPORT		
			ORIGINAL		
			COPIES		

☐ CONTINUED ON SEPARATE SHEET

REVIEW BY CHIEFS OF COMPONENTS

RECOMMENDATIONS

☐ CONTINUED ON SEPARATE SHEET

DATE	TITLE	SIGNATURE
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RECOMMENDATIONS

☐ CONTINUED ON SEPARATE SHEET

DATE	TITLE	SIGNATURE
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<input type="checkbox"/>	RETURNED APPROVED	REPORTS CONTROL SYMBOL ASSIGNED	DATE
<input type="checkbox"/>	RETURNED DISAPPROVED	TITLE	SIGNATURE
<input type="checkbox"/>	COMMENTS ARE ATTACHED		